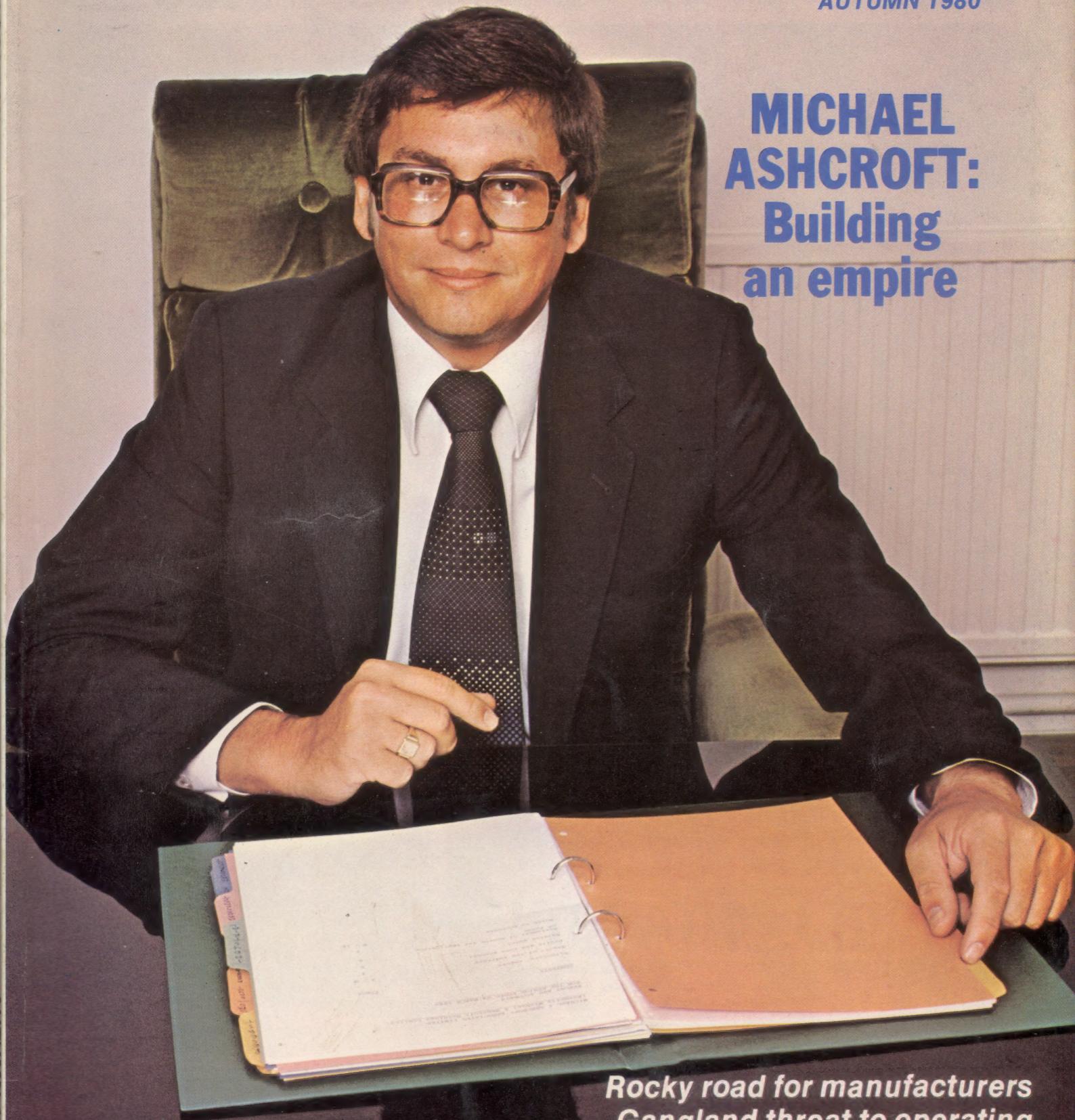


# COIN SLOT Location

AUTUMN 1980

MICHAEL  
ASHCROFT:  
Building  
an empire



*Rocky road for manufacturers  
Gangland threat to operating  
AMOA's solid foundation  
Juke box programming in 2000 A.D.*

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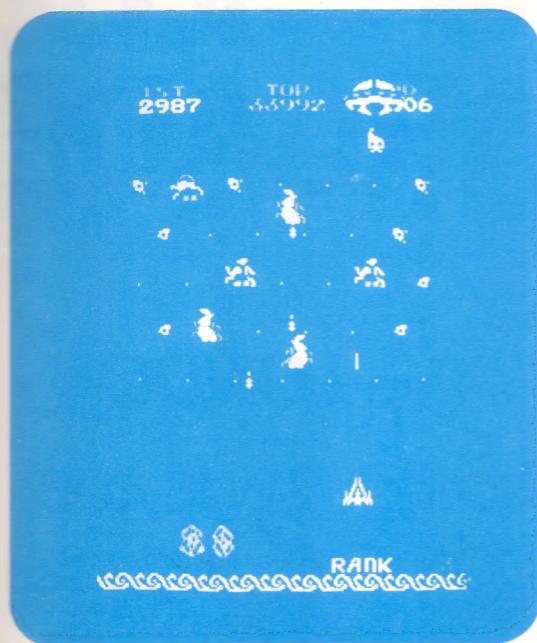
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## HOW TO PLAY

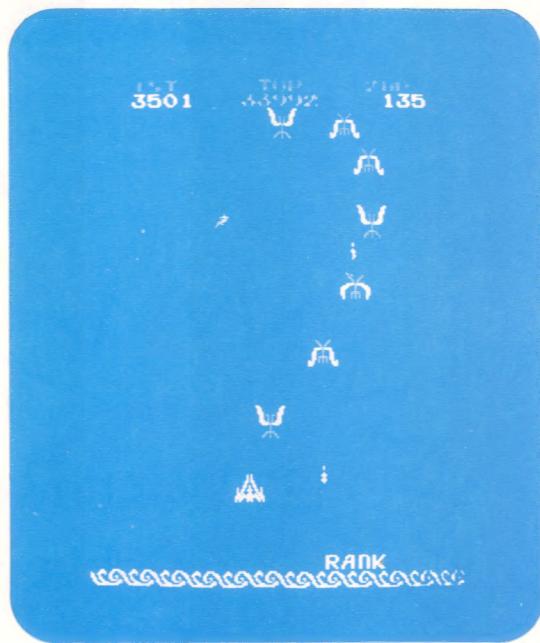
- Move the laser ship by working the lever and shoot enemy grubs as they drop from the UFO.
- When they land on the ground, they go into a hole, changing from a grub to larva. They move from one hole to another gradually dropping towards you.
- When hit the first time, it changes colour, decreasing in brightness. When hit the second time, it is destroyed.
- The larva changes into a cocoon when it drops to the lowest stage.
- When 7 cocoons have accumulated, they change into feathered ultramoths, assaulting from the sky.
- Scoring a certain number of points awards another laser ship. When all the laser ships are destroyed, the game is over.

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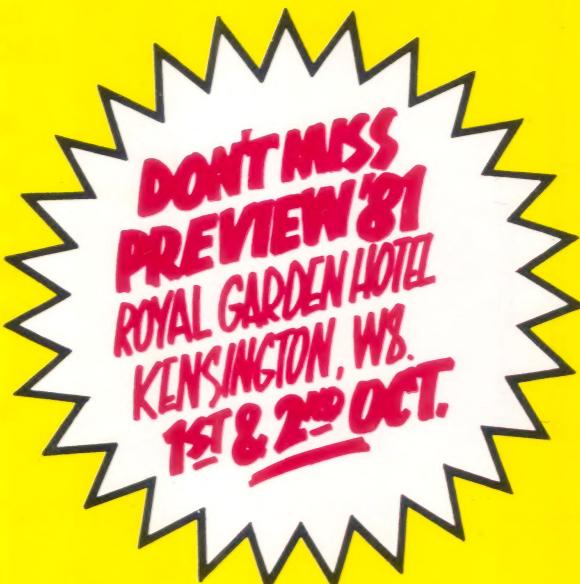
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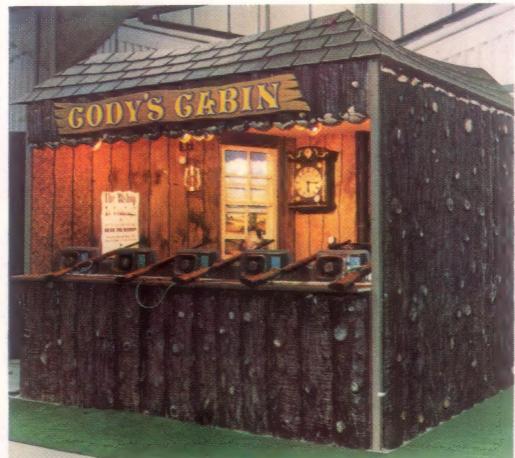
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Roger Wilson & John Mather**

---

*Advertising Administration*  
**Michael Mellor, Jnr.**

---

*Artwork*  
**Norman Bocking & Jack Kirkbride**

---

*Production*  
**Alwyn Greenwood  
& Ernest Mellin**

---

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**AUTUMN 1980**



**Michael Ashcroft, building an empire.** Hawley Leisure, a company steered from the verge of bankruptcy to a £30 million coin machine business

**Pages 8-11**

**Fruit machine manufacturing**—a look at an industry under threat from squeezed margins.

**Pages 16-19.**



**Micro-computers**—a plain man's guide to their use as a commercial aid.

**Pages 22-25**



**Juke box programming in 2000 AD**—revolutionary changes made possible by computer control.

**Pages 30-33.**

**Coin handling**—manufacturing techniques for security.

**Pages 48-51.**

**The changing face of video**

**Pages 42-43.**

**AMOA**—as solid as ever.

**Pages 54-55.**

**Seeburg**—salvaging a name

**Page 56.**

**Australia**—David Snook looks at the world of pokies in a land complicated with legalities.

**Pages 60-67.**



**Alexandra Palace**—an affectionate look at the place we loved to hate.

**Pages 68-69.**

**Volume 1:1.**



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**E**CONOMIC miracles are Michael Ashcroft's forte. He would probably contest the assessment and with studied concentration replace it with "an exercise in marshalling profitable sectors into units that respond to professional management".

In the case of 34-year-old Chichester born ex-grammar school boy Ashworth, however, the net effect is very much the same.

The track record is quite remarkable: His own consultancy business at 26, a two-year exercise in building up an industrial cleaning group from nothing to 4,000 employees and taking Hawley Leisure from the brink of receivership to a £30,000,000 turnover in three years.

More importantly to the coin machine industry, he led his company into leisure with all the dash of a crusader, collecting on the way Street Automatics, Ruffler and Deith, Gowerpoint Manufacturing, Hudson Brothers and Cherry Leisure.

The record could be described as the basis for an empire, a description he does not challenge but rather confirms that Hawley Leisure is by no means at the limit of its expansionist ambitions in our industry.

How he managed his economic miracle and more importantly, just how far will the aspirations of Hawley Leisure take it in the coin machine trade, took me to Farnham Common, just outside Slough in Buckinghamshire.

## SPECTACULAR

Hawley Leisure headquarters are above a row of unpretentious modern shops in the village's main street. "Just past the traffic lights; we're above the wine shop", he said. Unpretentious is an understatement for there is not even a sign to tell the visitor that Hawley Leisure can be found within.

Michael Ashcroft is hardly the epitome of the dynamic entrepreneur. Tall, young and bespectacled in appearance, mild mannered and thoughtful in attitude, yet particularly in the coin machine industry, people are judged very much on performance and the performance has been nothing if not spectacular.

He began work in 1967 as a financial management trainee with Rothman's and two years later moved to the Pritchards Services Group with whom he remained until 1972 when he started his own management and consultancy service for small and medium-sized entrepreneurial businesses.

## MICHAEL ASHCROFT:

# Coin machine crusader

After three years he looked for a trading company and began in industrial and office cleaning. During the next two years he put together a group of a dozen companies in that sector, eventually employing 4,000 people, with a dozen branches dotted around the country.

"It was a matter of finding a sector which was fragmented and which needed professionalism and which was ready to be grouped", he explained. The problem of his own limited resources was overcome by initially choosing a sector which was not capital intensive and for which he could obtain working capital from clearing banks.

"It was cheaper in cash flow terms to acquire businesses rather than expand organically" was how he explained his policy of taking over or opening up fresh companies within the same industry. It was a policy that was to have a profound effect on the coin machine trade.

In 1977 he was approached by Reckitt and Colman, the mustard to detergents firm, who bought him out for £1,300,000. It left him with cash to spend and a restriction not to compete with Reckitt and Colman for a couple of years.

"I was determined not to apply my energies in the private sector again and eventually was introduced at the end of October, 1977 to a company known as Hawley-Goodall Ltd., the forerunner of

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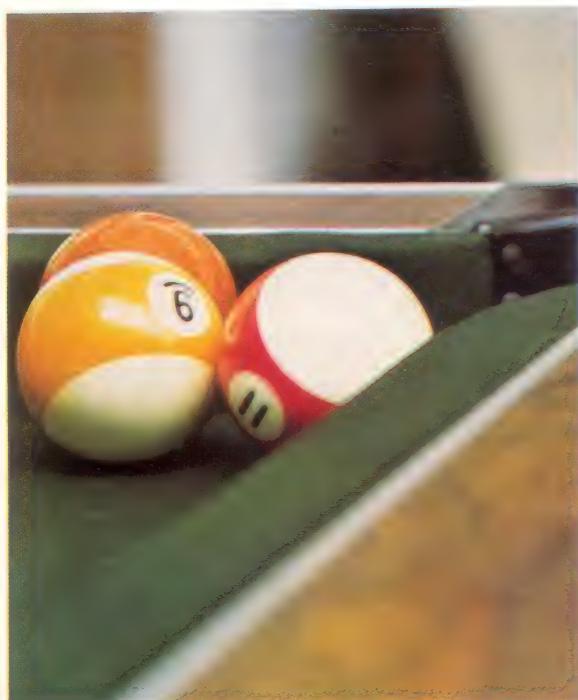
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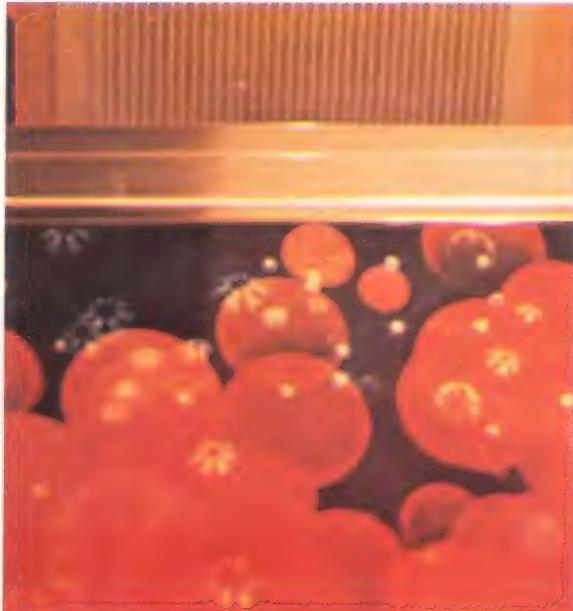
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Hawley Leisure". He became Chairman of the company which in his own words was "on its last legs".

In short, it had a turnover of £1,000,000 and made a loss of £100,000. In fact it had made seven losses in its previous nine years.

But why take on such insecurity?

"Having been restricted in activity previously, I had given consideration to which sectors had the greatest prospect of growth. Leisure was one of them. Having no experience does not stop one carrying out research into different sectors, you know".

And Hawley was in leisure. The group was in the manufacture of tents, wholesaled fishing tackle and had a chain of retail sports shops.

The Ashcroft strategy was simple. Get to understand it, find the areas within it which are profitable and remove the rest. He closed the sports shops and the fishing tackle business. Their product line was too wide and the shops were "of the wrong size, in the wrong position, stocking the wrong goods and under the wrong management".

Off came the dead wood for the time was not there to put them right, although when the group became more sound he took it back into the same sector, but this time with better positioning and management. But that came later.

### SPARE WOOD

The problem was that the company did not have the cash to trade its way out of the situation. The result was that out of the volume that he inherited in 1977, he had only half of that a year later, but the spare wood had gone.

To secure the company, he now had to bring in a profitable business. This was to be his insurance. If the main company failed then the insurance would offer a life-line of survival.

Then he had to find the capital to buy the

profitable company and as it was not there he had to find a company whose owners were prepared to accept Hawley shares. He wanted someone prepared to sell a viable business in exchange for shares in a loss-making company in course of reorganisation.

This was where his former experience with merchant bankers and a wide circle of business and personal friends came in. They came up with Streets Automatics and indicated that there was at least room to talk.

The upshot was that Streets' £43,000 profits of its previous year came into the Hawley undertaking for a consideration of 600,000 Hawley 5p ordinary shares on April 28, 1978. "It was a significant and major acquisition", said Michael Ashcroft, "for it gave us sound back-up".

And Hawley Leisure was firmly into coin machines.

A study of the trade, including an immediate subscription to *Coin Slot* followed, so that he was able to "get a feel" of the industry. His investigations led him to conclude that Hawley should major on distribution as opposed to manufacturing or operating at that stage.

"You had Associated Leisure majoring in operating and Bell-Fruit majoring in manufacturing, but there was not a major company into distribution which was also in manufacturing and operating. I felt that manufacturing was too vulnerable because of the high fashion consciousness of the trade. Distribution was safest because you had a choice in what you bought and sold. In short, you could always be trading in winners."

"Operating was discounted because at first we would be small or medium-sized and would be





unable to take advantage of major group purchases. How could we effectively compete against people like Associated Leisure?"

The quest for distribution brought Hawley into contact with Ruffler and Deith with the result that on May 10, 1979, R. and D. became a Hawley company for an initial consideration of nearly 1,500,000 Hawley 5p ordinary shares and £600,000 in cash. In return Ruffler and Deith brought to Hawley 1978 figures that showed a turnover of nearly £5.5 million and profits before tax of £170,000.

It also brought to Hawley the second part of what was to become a complex but precisely-fitting pattern of companies forming the foundation of a substantial coin machine empire.

But was Michael Ashcroft buying a man rather than a company, as the trade had suggested? "In our philosophy we allow for management. Bob Deith is recognised as one of, if not the, top salesman in the country in the industry. Ruffler and Deith in general and Bob Deith in particular fitted our ideas of higher autonomy but higher accountability".

A hi-fi retail chain of shops, a custom-built furniture company and a chain of retail leisure shops, all followed as the Hawley growth gathered momentum in two directions, leisure in general and coin machines in particular. But by now the group was better placed to handle leisure shops.

## Building co

Gowerpoint Manufacturing followed and then Hudson Brothers as a delighted Michael Ashcroft told the long-suffering shareholders in Hawley Leisure that their patience had been rewarded by record pre-tax profits of £520,667 for 1979. In that same year the turnover of the group soared from £1.065 million in 1978 to £11.324 million.

The Gowerpoint takeover was, in fact, a purchase of 60 per cent of the company. The move was deliberately pattereded to fit in with the distribution side of the group and aimed at more back-up for a launch into single-site operating.

"Arthur Thomas's company is innovative and fitted in well, for there are not too many manufacturers of the right size and at the right stage of development to require a support factor. we gave them financial support and they gave us manufacturing experience and a source of supply for our operating ambitions".

Operating came with Hudson Brothers, trading as Musomatics, the well known and long-established Nottingham company which was bought for £400,000 in Hawley shares and £43,000 in cash.

That was in April, this year, followed quickly by the acquisition of Cherry Leisure. In essence Hawley bought Cherry's assets and stock for £1.3 million.

"Within that figure is approximately £1.1 million which is first-year allowable expenses against tax on profits on the whole of the group's activities. It guaranteed that for that year Hawley as a group paid no tax.

"It also gave us, in one fell swoop, a reasonably nationally-based operation with twelve depots in the regions which had not, in fact, been operating at its full potential. Its Swedish owners had to pull out of the amusement industry through changes in the Swedish law and, obviously was not putting sufficient working capital into Cherry to achieve its potential.

"It caused them massive problems and they lost

*'The brewers could end up so*



# g coin machine empire

sites as a result. In the six months since the take-over was completed, the company has shown a net increase in sites every month".

Fifty per cent of Hawley's group interests are now involved in the coin machine industry. It has two manufacturing companies, a major distribution company and two operating companies with a combined total of around 3,500 sites.

This base is widely spread and ready to support a much larger involvement. That involvement, says Michael Ashcroft, will be in single-site operating. He is now seeking to buy up small to medium-sized operating companies to build up a network of operating all over the country. His philosophy of keeping original management, liberally bestowing autonomous rights—albeit under group discipline—and ready financial back-up, will be strictly adhered to.

## EXPANSION

"Operating is the only means of expansion open to us, now that we have adequate manufacturing and distribution cover. Increasing operating holdings means buying out other companies for there is little new business to be had in relative terms. By its definition, this policy will carve out for itself a single-site empire, but that growth is restricted by opportunity".

He sees the coin machine industry polarising into major groups. In operating he sees that current void between large companies and small companies becoming more pronounced.

The brewers, he says, are the strong men. "The trade squeals when they squeeze and there is a lot of squeezing to come and the survivors will be the strong companies".

The chill warning was, however, tempered by the warning that to squeeze too tightly could work against the brewers. "If three people can paint your house you screw them down by price to one person. What you have to bear in mind is that too much squeezing could result in just one person

being available to paint your house next time round and he can charge what he likes. In the same way, the brewers could end up squeezing to their own disadvantage".

The main contributing factors to the remarkable rise and success of Hawley Leisure can probably be based on one overriding consideration, finding the right people at the right time. Having done that, it is secondly due to Michael Ashcroft's ability to reconcile the entrepreneurial nature of those people with the professionalism bred by keeping those people within controlled bounds.

Keeping his unique collection of colourful characters in a situation where they still find motivation, satisfaction and security is a basic requirement of the group's consolidation.

Having the ability to snatch the main chance may also have something to do with it.



*Pictures by MARIE O'CONNELL*

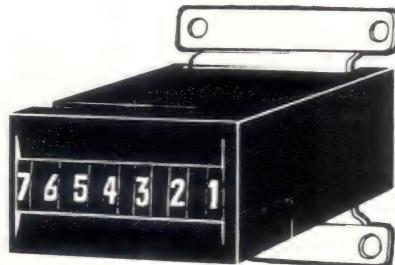
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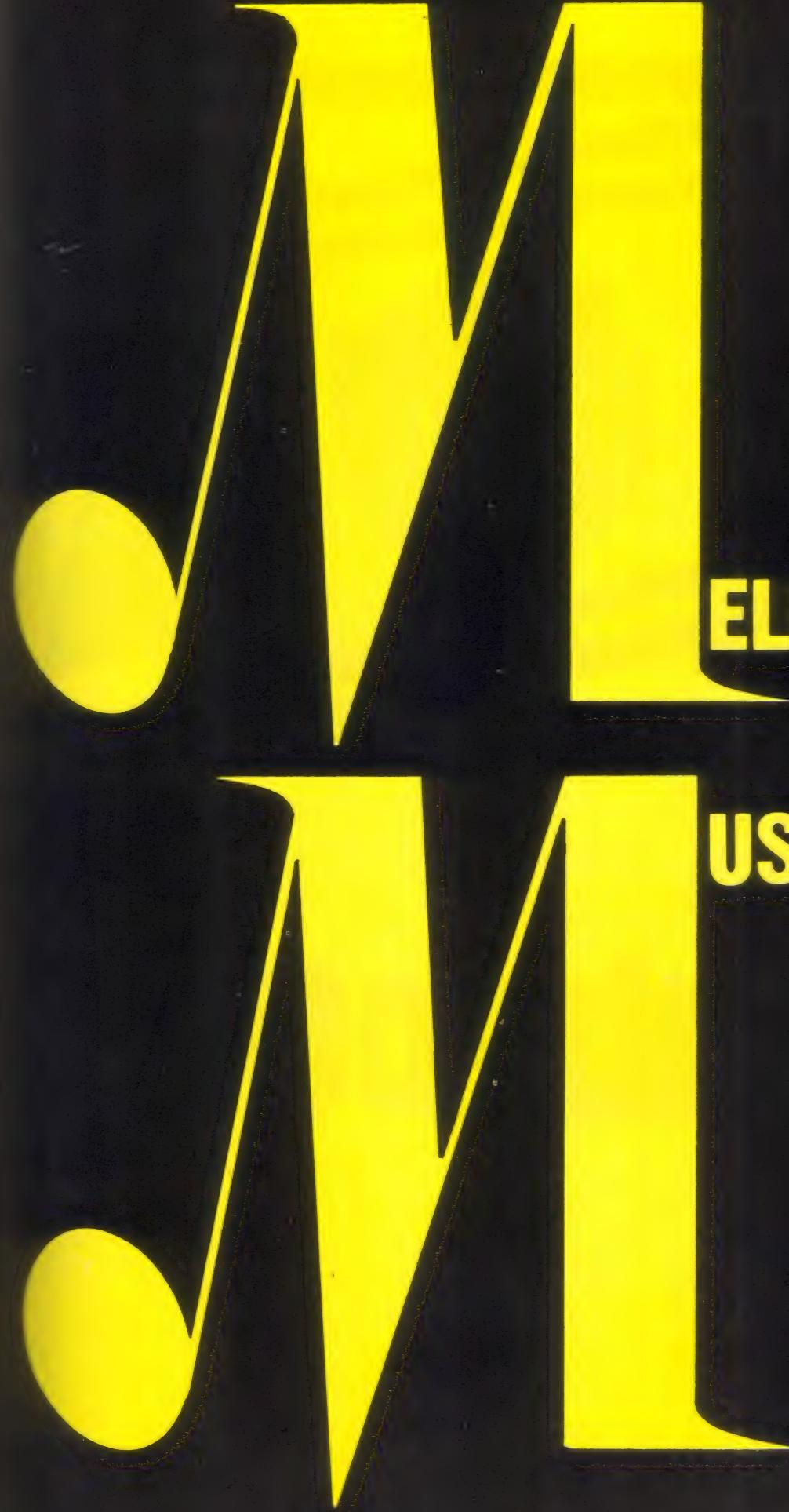
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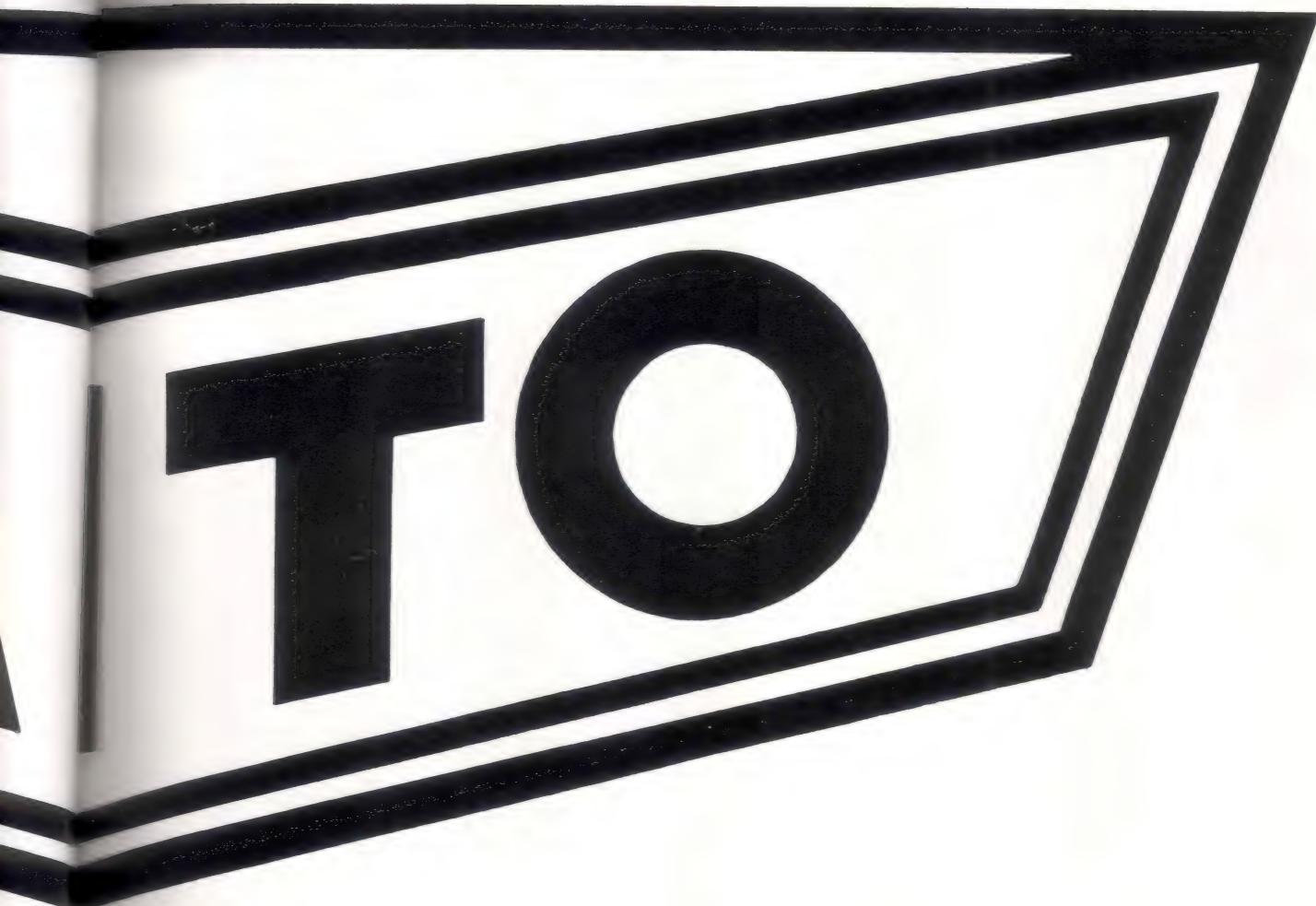
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1971

*IN October, 1971,  
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Luxe cost £399 with purchase tax  
and delivery—operator price. In  
October, 1980, Bell-Fruit's Gamblit  
cost around £700 excluding Value  
Added Tax and delivery.*

*The conclusion is that the price of  
the average a.w.p. fruit machine  
has risen by 100 per cent in those  
nine years. That represents around  
seven per cent per annum,  
compound.*

*During the same period, almost  
every conceivable commodity  
supplied to the coin machine  
industry, from motor cars to  
electricity, from rates to the boss's  
lunchtime gin and tonic, have risen  
by infinitely higher percentages.*





**A**N investigation of public records throws up two startling facts: That comparatively few fruit machine manufacturing companies actually honour their legal obligation to file records of their annual accounts and balance sheets and that a look at documents relating to those companies that do file their results, brings the inevitable conclusion that all is not right with our manufacturers.

It is worth noting immediately that under Section 124-127 of the Companies Act 1948, accounts and balance sheets must be lodged with the Registrar of companies within forty-two days of an annual general meeting. Failure to do so could result in a fine of £5 a day for the company and the same amount for each officer of the company. More importantly, conviction could lead to the company being struck off the register and therefore unable to trade.

Our investigations showed that few of the manufacturers actually lodged figures since 1976. The reason for this was not hard to find for looking through the results of those companies that did, we found the majority made losses in the financial year 1978-79.

It would serve no useful purpose in this exercise to hold up to public scrutiny the results of individual companies, especially when so many others have chosen to withhold their results. Suffice to say that anyone who would care to confirm our statement that the 1978-79 figures existing in public records show disastrous trends for manufacturers, are at liberty to do so.

### YARDSTICK

Of immediate concern to the manufacturing trade is how this situation arose, creating an awareness of the problem among operators and brewers and, obviously finding a solution.

As an immediate yardstick to the extent of the problem, we conducted a survey among operators to discover the kind of prices they have paid for their a.w.p. fruit machines over the past five years and the average rents they have received.

The result has been adjusted to give a figure comparable with the Retail Price Index. When the R.P.I. began at 100 points in 1974, the effects of inflation pushed it gradually, sometimes spectacularly, higher. It now stands at 272 (1979 figure). The related figure for operating rents stands at 220 and a.w.p. machine prices at 156.

By itself, the figure of 156 is a graphic illustration

## Location survey finds disastrous trends

of the problem. The margins would appear to be falling short.

The rents also show a shortfall, but at least are somewhere towards the top. This is probably due to a considerable extent to efficiency of the manufacturers in maintaining quality and promoting security measures.

How has this chilling situation for manufacturers arisen?

Ten years ago, a.w.p. machines could have been accused of being over-engineered. Machine prices have been kept down largely by the ingenuity of the manufacturers which has led to material costs being pared.

This was a natural process, for in the six or seven years following the 1968 Gaming Act the manufacturers learned how to make machines more cheaply through experience. As material costs were cut so, in the same way, the labour intensive content in manufacturing processes was also cut.

But this is not a process that can be carried out to an infinite degree. Eventually the manufacturer must cut down to an irreducible minimum and leave himself with no choice but to follow, as far as competition will allow him, inflationary trends.



The introduction of new technology initially helped to cut costs, but the demand for more entertaining games made possible by the new technology, in itself acted as a brake to cost-cutting.

The upshot was more reliable games with greater play-appeal and therefore more hard working machines, and all at a price effectively lower in real terms than was paid ten years ago.

The Retail Price Index figures for example, shows that machines are now only 57 per cent of their cost in 1974 once inflation has been taken into account. Better, more hard-working machines at a 40 per cent discount!

A lack of profitability seems to have been the result, however.

Getting the facts across to the customers is a major problem. Both the brewers and the operators are probably not really aware that difficulties exist for the manufacturer. Indeed, many brewery executives have been heard to comment that the manufacturers make all of the money. The entire industry, for that matter, would appear to be tainted with the idea that there are vast profits to be made by manufacturers of fruit machines.

## LEGISLATION

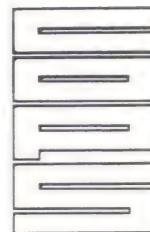
What has helped the manufacturers is the regular changes in legislation, particularly with regard to stakes and prizes. When a change has taken place there has been a rush to purchase. The breweries obviously wish to have all the machines up-dated to the new specification. This has been satisfied by a combination of conversions and new equipment, since the industry simply does not have the resources to re-equip itself totally in a very short space of time even if this was not totally uneconomic in any case.

Over the past three years, however, stakes and prizes have been static and there is currently an agreement between the trade and the Home Office that future changes will hold good for similar periods.

This is obviously a great benefit to the operators and to the breweries. But it has taken away from the manufacturers the artificial, but nevertheless welcome, periodic boost and can be at least in part blamed for the downward trend in manufacturers results leading up to the 1979 figures.

The manufacturers have been forced to produce a

JEM



**Lyngard**

wide selection of machines against the same specification, at the same time inhibiting their own research and development departments by their inability to work with new specifications.

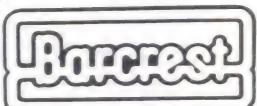
Was the three-year agreement a mistake? The facts would tend to suggest that it was. After all, no other business would allow its major parameters to be fixed over three years. Being anchored firmly for such a long period meant that the increase in Value Added Tax to 15 per cent on machine takings became a turnover tax that was not recoverable. It meant the brewers suffered a reduction in income at a time when "wet" sales were taking a beating. Less in the "kitty" to pay rents had a further effect on operators' ability to invest in new machines. The circumstances were entirely unforeseen as was the rate of inflation.

Who can say that over the next three years there will not be similar disasters to hit the industry? And given the problems facing the manufacturers, can they withstand the pressure?



## ARISTOCRAT

*magaz*



The industry has done well in the field of exports. In overseas markets there is often more scope for interesting and complicated machines because legislation in other countries tends to be less restrictive. Then the natural laws of commerce take over and the better a product the better the margin.

### SCOPE

More important to the British manufacturer is that the export market widens his base. With the home market static in terms of the number of machines on site, it is only those manufacturers selling more that do better. At home, someone's gain is always someone else's loss, but overseas the scope for expansion attracted some manufacturers and they have benefitted as a result.

That boost may not last for too much longer, however, for high inflation and the strengthening pound makes our products continually less attractive.

The conclusion is that in order to provide the manufacturer with the means to continue in business, let alone invest in research and development, the average machine price should be raised and with machine rents lagging behind then the increase must be passed along the line to the consumer, in this case, the brewery.

The brewers, of course, will protest that machine prices are already too high, but they should remember that their information probably comes from their operators. The operator, in pressing for higher rents, is bound to stress his overheads and they, in turn, must include the increasing price of equipment.

The time for an end to commercial wrangling may have come, however, if the business in all of its facets is to face facts. Squeeze the manufacturer too hard and there may end up being no manufacturers to squeeze at all.

### CONCLUSIONS

We took our findings along to John Marshall, Chairman of Division 4 of the British Amusement Catering Trades Association and himself a manufacturer with Barcrest.

His comment was: "I am forced to agree with your conclusions. I have been aware for some time of the constant pressure on the manufacturing industry. I believe that the kind of investigation you have carried out can only help the situation as it may make the operator and the brewer more aware that a problem does exist".

It is a peculiarity of our industry that while we are constantly made aware of the ravages of inflation and grumble while paying 20 per cent extra for everything else in life, we baulk and protest at even the idea of 20 per cent going on the price of a new machine.

If we take £800 as the average for a new a.w.p. machine at the moment and add 20 per cent for inflation we arrive at £960. That would enable a manufacturer to stay precisely where he is at present—suffering. It is not for us to say what is needed to put life back into the manufacturing industry, but if it was say, ten per cent, then the price of the average a.w.p. machine at Olympia in January will have to be around £1,050.

The choice is the trade's. It may well be that without that kind of increase the trade will find itself in a situation that will be difficult to reverse.



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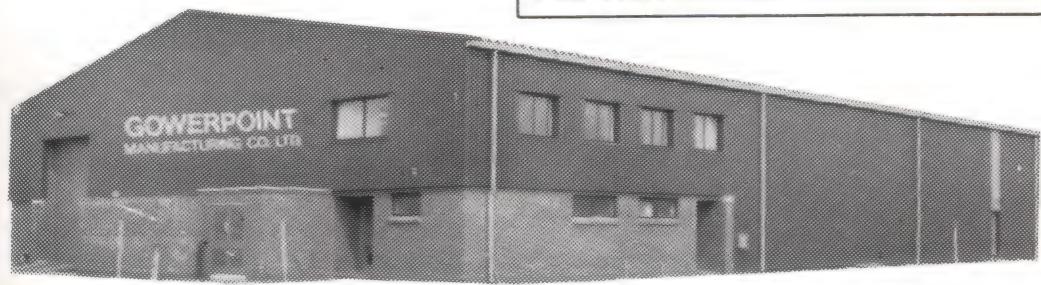
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PRIOR to the 1970s, only large companies could afford a computer system. But the new computer technologies of the late 1960s and early 1970s reduced component costs.

Cheaper memory enabled the development of new programming languages, deskilling the programmers task to a level where now any manager can programme and implement his own computer system. Using desk top microcomputers costing a few hundred pounds, systems can now be developed on a do-it-yourself basis for a total capital cost of less than one employee's salary; the running costs of the system based on microcomputers is thereafter virtually maintenance free.

Since microcomputers were introduced into the UK about three years ago, over 57,000 machines have been sold, mainly for systems with an average price of £3,000; the largest buying group being the small businessman (70 per cent); home hobbyists accounted for seventeen per cent; while education and schools made up the remaining thirteen per cent. The latter have played a significant part in the introduction of microcomputers to small business. Brought up in an atmosphere where computers were very expensive, it has been very hard to convince businessmen, including computer experts of the early school, that the new smaller cheaper microcomputers could actually perform serious business applications.

## ABSORBING

Children versed in the new arts have often been the first to enlighten business parents in the new truths; microcomputers bought lightheartedly as an executive toy have often proved so absorbing as to create a new generation of golf widows—'the microcomputer widow', with Dad accepting the challenge to create his own business system in his spare time.

Microcomputer sales in the UK, although lower than in the United States, have given encouragement to computer technologists who see the machines as forerunners of their store of future devices; one has to think about 15 years forward with products in mind. It's a fact that a depression will always promote business for technology based products as managers seek cheaper alternatives and man prices himself out of work.

# The easy way of computing

## A PLAIN MAN'S GUIDE

Microcomputer sales create an awareness and soften up the markets for the large computer suppliers' next generation of integrated information system products due for release in the next three years.

By the promotion of business and education sales now, the customers will accept future technologies more readily. It also encourages home users to start to think about producing professional systems; this provides a useful backup for computer hardware suppliers who are finding it difficult to support the cheap computer markets.

The microcomputers have been sold to at least 60,000 persons in the UK in the past two years, the first introduction to computers. The majority have been small businessmen who by chance have seen the products in the new personal computer shops, or who have listened to their children's enthusiastic chatter about programming their school machine. At least one London computer shop depends on a schoolboy working spare-time to provide the software programme and computer systems expertise for clients. His output is of a high quality, although he only started computing at school two years ago.

As with so many new benefits, it is hard to convince hard-nosed businessmen that the microcomputer is probably the best new tool to come their way in their lifetime, and could enable them to increase growth and competitiveness even in the present tough circumstances. It is small, cheap and easily applied to business problems without resort to expensive computer experts. You don't believe it! Well, take the facts one at a time:



E BY ALAN TAYLOR-SMITH

**SMALL**—the processor and keyboard is the size of a portable typewriter and lighter in weight. Information and files are stored on music cassettes, or for faster operation on magnetic recording "floppy discs", five inches in diameter in a handy unit. The largest part of the system is the printer, necessary if you use the printed word; a normal IBM executive typewriter or similar printer can be modified to link-in.

### FLOPPY DISCS

All the equipment will easily fit on the desk top and operate from the 13 amp power socket.

**CHEAP**—the largest processor with 32 thousand (or 32k) memory cells will cost £650 or 64k memory cells about £800; the cassette recorder is £50 for a reliable model; the fast "floppy discs" about £350 per drive; it is simpler to use them in pairs. Printer prices mean you get what you pay for; if you only need to use the printed output in-house, a cheap printer will suffice at £400. If you are in a business where presentation is everything, a high quality printer will be the most expensive part of the system at about £2,000. When will the peripheral suppliers understand that they are out of step with current price trends in technology products? Probably not until a smart Japanese printer supplier moves in to motivate a downward price trend—Japanese or enterprising UK manufacturers please note.

It will be seen that the complete small business system supplied from £1,800 without software; if you are a do-it-yourself expert you could manage with about £500 of software packages which could be adapted to give a useful and powerful boost to

business. Those who prefer to use tried software packages and are prepared to adjust their business practices to fit the software where necessary, could run their system on packaged software costing as little as £1,000.

Computer prices run against the usual inflationary trends; each year quality increases and prices decrease—that's the value of good open international competition for you. The lowest prices will occur about 1985 when Japanese technologies will knock the bottom out of the market. We don't suggest that you wait until then to buy your computer; already microcomputing is at a price you cannot afford to refuse.

### EFFICIENT

For the first time in computer history, the expert has produced the long awaited man-machine communication link—BASIC the Beginners All-purpose Symbolic Instruction Code programming language. This tool enables everyone to become their own computer programmer. BASIC is built into almost every modern microcomputer and is available for use every time you switch on. The user communicates with the machine using ordinary English words like; Print, Go to, If, Then, Let. The essential BASIC words can be learnt in less than two hours and a weekend of practice at home will enable you to write efficient programmes.

Review the situation so far; you can have a complete microcomputer system for as little as £2,000 and a weekend of instruction and practice will give you a working knowledge of computer programming. The most important fact not mentioned so far is that you alone have the detailed knowledge of your own business and are therefore best placed to do the conversion of the business practice to suit your specific needs.

Given information on the best approach to systems design you could be well on the way to developing your own solution to competing in today's world.

Regrettably at the moment relatively few managers appreciate the enormous value that the new cheap desk top computers can be in the running and problem-solving operations of their businesses.

Micro-processor, and personal computer can be regarded as synonymous as far as the user manager is concerned. It refers to the equipment

combination of the processor (the screen, keyboard, and memory part); the printer looking much like the normal typewriter but without an operating keyboard; and the file storage devices, from the cheapest music cassette recorder to the floppy disc drives (using small five or eight inch discs of magnetic material rather like the 45 r.p.m. hi-fi records).

The complete system can cost as little as £2,000. The processor cost is dependant upon memory capacity (expressed in terms of "K" or thousands of memory positions) with the 16k processor, costing about £400, to the 32k version at about £800. Cassette storage costs about £50 with floppy discs drives at about £350 each (it is more helpful to use them in pairs). With printers, you get what you pay for. A cheap (£350) tractor printer will give a good printed record for internal purposes, whereas at the other end of the scale a £2,000 daily wheel printer will enable you to communicate with your clients in a style worthy of the best executive typewriter.

## **Applications**

The range of personal computer applications is almost as varied as the manager's ingenuity in defining his problem. In summary, they can be categorised in the following groups:

*Running the routine business operations:* accounting; stock control; invoicing; credit control.

*Secretarial work:* typing repetitive letter variations on a standard theme; keeping and amending lists; report writing; filing and retrieving.

*Modelling:* simulating possible business opportunities; extending past trends into the future; analysing and correlating information; financial modelling.

*Decision making:* appreciation of the situation; definition of courses open; risks and rewards associated with each course; associated probability factors; recommended "best" courses of action.

### **Routine business operations**

Payroll has been excluded deliberately. Unless your business has very few employees (under 30), all under the same pay conditions, or you employ thousands, payroll can tie up your efforts in continuous programme changes as governments continuously change this and that.

The desk top computer is ideal for the manager, who is often forced by pressure of work to do tomorrow what he should have done today.

Many accounting and stock control programmes have been written on the basis of "open item entry". You key in randomly the items, date and category, and the computer puts it in the right order to produce the sequential reports you should be keeping. The 64k computer has considerable capacity to adequately accommodate the small business requirement. Large volumes of data can be handled on floppy discs and rapidly accessed when required.

Invoicing can be a by-product of order entry and stock control operations and include all repetitive entries like envelope addressing. Monthly accounts can be printed automatically after the final orders are processed, and include all the desired management summaries.

The routine business operations present little problem to the microcomputer. It has all been done before on the earlier costly large machines, and the lesson learnt from early experience has been combined in a variety of packaged, off-the-shelf programmes available at low cost (£50 to £300).

### **Secretarial work**

Word or text (both terms mean the same thing) processing programme packages are available from £50 upwards. You get what you pay for. The cheapest system enables the typist to type, rearrange, store, retrieve, and print constantly used sentences, while the best systems offer sophisticated report writing capacity worthy of the best legal or quantity surveyor departments.

Information can be stored and retrieved with help from the typist, in ways only dreamed of previously. As technology offerings appear over the next five years, managers can look forward to equivalent storage capacities to the filled four drawer filing cabinet being contained in electronic memories the size of a match-box.

### **Modelling**

The microcomputer could have provided the essential information to have prevented many of the recent bankruptcies due to over-stocking. How many businesses have overdone the "customer service" aspects of stock holding. Demographic modelling before and during business operations, to use only one modelling example, can be a valuable tool to ensure cash flow and optimum

*ALAN TAYLOR SMITH is Managing Director of Online Working Ltd., a company specialising in computer advice for business; he is also senior tutor of the British American Tobacco Group Management Centre at Chelwood, Sussex. Online Working run various short courses in "computing made easy" designed for small businesses. Alan Taylor Smith brings to the subject as he says "twenty years of hands-on experience in the computer industry".*

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"customer service" compatible with business survival and growth in these hard times.

Recorded daily happenings can be a valuable asset, if stored and run through from time to time. They can indicate trends—and new directions and opportunities for future trading. They can tell when present materials will price themselves out of your operations or when previous non-viable processes are economic considerations again.

Money market and commodity market dealers for instance, could probably save the cost of the micro-processor system in improved decisions in the first few hours of dealings. It is all a question of defining the essential factors and criteria of the problem that faces you in your decision taking each day.

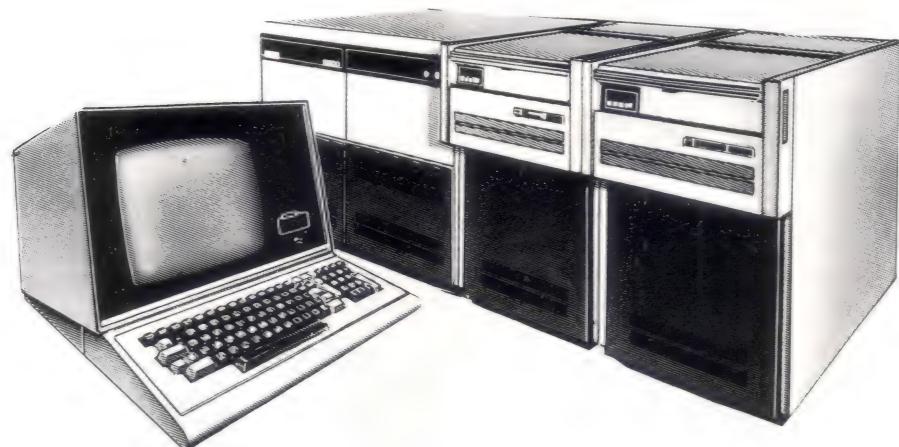
With modern computer languages such as "BASIC" the modern manager cannot afford to ignore spending say at least two days learning how to programme a personal computer. The time spent learning will be rewarded in time and profit saving thereafter.

#### *Decision making*

All those who have served in the armed forces will

recall writing "Appreciations of the Situation" prior to rushing off with blackened face and rifle to attack the lone hill. The same appreciation technique can be easily applied to board room and managerial decision making. It is a matter of quantifying, qualitative rather than quantitative matters; judging the criteria and weighting and throwing them into the problem. The computer is a valuable aid to test the ingredients of the problem—a pinch of this—a bit of that—what if, and all the rest of the variables to produce the "best" answer.

We are not suggesting that desk top computers will be the be all and end all of future decision making, but they can explore, most importantly in an unbiased and impartial way, all the courses open and arrange them into a best course sequence for managerial decisions. Heaven forbid that we should ever adopt the style of a rejected military proposal made in the early 'sixties, that soldiers could be automatically posted to their new jobs based on a computer decision matching their round peg qualities with the round hole vacancies. Let's leave something for the directors and managers to do between moments of key pushing.





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**I**N the year 2000, a collector will go into a site, change the records, or by then tapes, on a juke box and plug in a kind of tape recorder to the memory unit.

The memory unit will feed into the recorder the site number, date, total number of plays, and number each record with the amount to which it has been played, as well as a wealth of other information.

This will be taken back to headquarters and fed into a computer which will store all the information and at the flick of a switch give a read-out of the entire operation's performance, site by site and even the performance of individual records throughout the business.

It is no pipe-dream, for one company, Music Hire, are almost there already.

The Music Hire juke box operation in particular has seen some revolutionary changes in recent years, so much so that the company's claim to be the most advanced in juke box operating systems in the business, may be uncontested.

The firm's records manager, Eric Kimble, showed us the system in detail and explained how it works and its potential.

He began with a pop meter. This is the standard piece of information equipment in any box over three years old and is, therefore, probably still the most commonly used.

## ACCURACY

The meter, quite simply, consists of a series of pins in a circular metal base. Each pin represents a particular selection and as the carousel turns and a record is selected, then so a pin is pushed a little further out. The collector can gauge—with varying degrees of accuracy, depending upon the collector—how often a record has been played.

Despite its simplicity, its problem is a lack of accuracy and the inability to indicate usage over around 30 plays.

In recent years the device has been replaced by electronic registers, but they too have their drawbacks.

Music Hire operate their own sound service system. A large mask is produced to replace the title strip system. The mask gives the top 40 with selection numbers, then a supplementary list of top 40 overflow and house specialities. Then there

# Juke box programming in the year 2000 AD

are four different category lists as well, packs of ten records of a particular type, such as progressive, disco or even ethnic selections for individual sites.

Each collection the records are replaced where necessary and different speciality packs are used to hit the best combination for that site, depending upon the area manager's assessment. The packs come in twelve different varieties.

When Rowe, Music Hire's preferred make of phonograph, changed to their Memorec system of play frequency monitor, it was a vast improvement on the pop meter. It registered up to 99 plays, and was far more accurate. To obtain the information, however, it was necessary for the operator to push a switch to least popular or most popular and work his way gradually through to get an overall picture.

With most American juke box operations no bigger than 200 sites, the system was satisfactory and for most British operations it was too where the title strip system was used.

For a large operator, however, it was a different matter, far too painstaking to be feasible. One of the advantages of a large operator, however, is that he has the ability and capital to invest in his own research and development department. The Memorec therefore, went straight into the boffins, who developed a modification. This consists of a cowling on top of the Memorec unit containing a cartridge.



*The MHG Sound Services 'mask' with Rowe's Memorec and the MHG cassette adaptation*

The cartridge acted as a memory duplicator, extracting the information from the Memorec unit in a much more accessible way. Now the collector brings back the cartridge from the site, and it is fed into the regional office's Ventek computer terminal.

Each of the eight regional offices in the Music Hire operation is on the system which carries a specially-designed interface unit allowing the computer to accept the information from the cartridge.

The information fed in is printed out by the computer and the area manager has all of the information regarding the performance of each site in front of him, together with the performance of each pack of records and each record within that pack.

From that information he can try out different packs of speciality records to improve performance.

The figures are passed via landline to the big PDP11 computer at the headquarters of the company in Leeds, where figures from all of the regions are accumulated and assessed. Based on national trends, the company can then delete ten records from the charts and predict their replacements. These details are sent back to the regions for re-programming.

At the same time the area manager can ask the computer for a print-out giving the progress of an individual site over the previous 16 weeks, a copy of which goes to the brewery liaison man as well so that he is armed to talk about progress with the breweries.

The effect of the system, apart from its accuracy and speed, is that a picture is built up of the whole country. Eventually it will be possible to trace the pattern of music trends, forecasting successful records still further in advance.

### **POTENTIAL**

What is happening at Music Hire is the product of the British pub system, which has permitted large operations to grow. Its fruits, however, can be enjoyed in other countries. Music Hire has subsidiary companies in France, Switzerland and West Germany and already is offering its music systems to operators in those countries who buy Rowe phonographs from them.

It has to be the way the industry will develop in the future", said Eric Kimble. "Without accurate information professional programming cannot exist and phonographs can never achieve their true potential. When the plug-in recording of memorised information on-site comes, then we can progress still further".



EOT NUMBER 23138 DATE 11/06/79

DAYS 14

IPI NUMBER 10101 TOTALISER READING 1008

TOTAL PLAYS—ACTUAL 1743  
14 DAY AVERAGE 1743  
RECORD TOTAL PLAYS 9999

EOT NUMBER 18796 SITE HISTORY		TOTAL SELECTIONS										TOTAL PLAYS—ACTUAL 1743							
EOT NUMBER 18796 SITE HISTORY		%AGE OF ALL SELECTIONS 49										14 DAY AVERAGE 1743							
EOT NUMBER 18796 SITE HISTORY		BANK 1	BANK 2	BANK 3	BANK 4	BANK 5	BANK 6	BANK 7	BANK 8	BANK 9	BANK 10								
DATE	BANKS 1-4	BANK 5	BANK 6	BANK 7	BANK 8	BANK 9	BANK 10												
	TOP 40	H S	H S	SSPACK 1	SSPACK 2	SSPACK 3	SSPACK 4												
P	%	P	%	P	%	P	%												
28/6/79	2205	53	275	7	269	7	SS4	511	12	HS1	294	7	SL4	254	6	PR8	317	8	4125
12/7/79	2115	54	291	8	250	6	SS4	320	8	HS1	290	7	SL4	200	5	PR8	400	10	3866
26/7/79	2198	53	301	7	248	6	SS4	361	9	HS1	254	6	DF1	375	9	PR8	398	10	4135
9/8/79	2213	52	351	8	236	6	SS4	314	7	HS5	397	9	DF1	361	9	PR8	372	9	4244
23/8/79	2091	51	360	9	225	5	SS4	307	7	HS5	385	9	DF1	350	9	PR8	361	9	4079
7/9/79	2351	54	371	8	231	5	SS1	423	10	HS5	360	8	DF1	328	7	PR8	321	7	4385





# tomorrow's programming

THE top read-out in the table opposite gives the site number (EOT number), date, the number of days since the last collection, total plays, average number of plays for 14 days (collections are not always precisely on time), cartridge number (IPI) and then security references in the form of totaliser reading and record total plays.

The first four banks shows each individual record in the programmed Top 40, how many plays it has received and the percentage that represents of the top 40 selections.

The next two banks are the house specialities, generally the landlord's choice. Banks 7 to 10 are the individual packs of categorised selections.

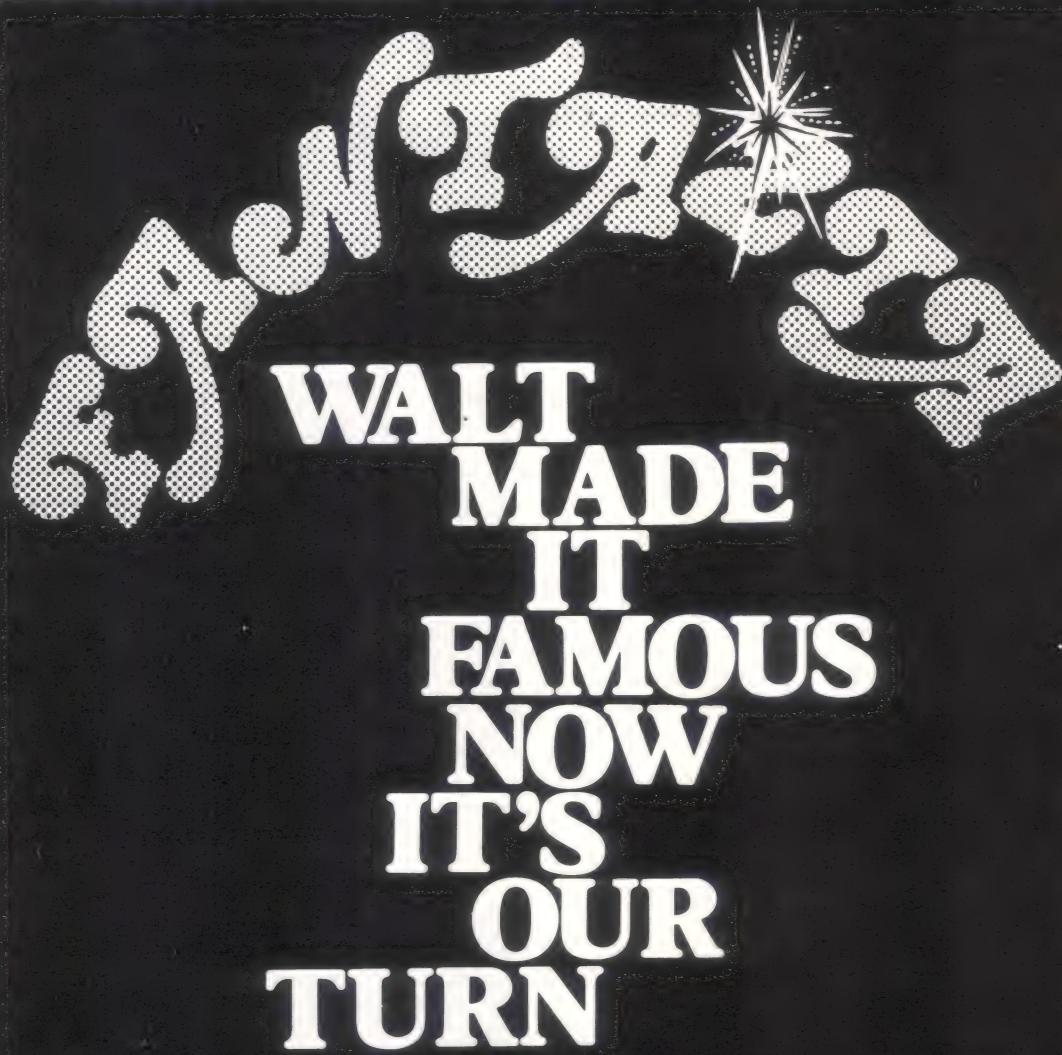
From this, for example, the area manager would be able to see that the speciality pack EO2 only has four records that are performing well and it may be that head office, given supplementary proof from other regions, may merge this pack with the best discs from another pack.

He can also see from the house specialities that the landlord's selections are not always the most preferred by his clientele, and provides evidence for the brewery liaison staff to show the brewery if they receive a complaint about performances. Turning to the second read-out, this provides a history of one particular site over a six-collection period. It shows that the number of plays for top 40 records is running at rather over 50 per cent, which is what Music Hire regards as the best situation. It also shows (banks 7 to 10) how the special packs are performing and the improvements gained from regular replacement as one pack loses popularity.



Farewell to the pop meter, held above by Eric Kimble, Music Hire's records manager. It is replaced by the cassette system fitted to Rowe's Memorec by MHG engineers and the results are fed into tomorrow's monitoring system, the sophisticated computers at their Leeds headquarters.





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The da



# The changing face of video

THE video games market has changed radically since its traumatic inception and is evolving rapidly. The dominant manufacturers of Japan are finding their talented sources being tapped with increasing abandon as new manufacturers appear on the scene around the world.

Between them, however, little variety in new games seems forthcoming. Indeed, Taito Electronics claim there are probably one hundred different versions of their Space Invader success.

The industry's majors are obviously conscientious of the need for change, however. Universal have recently introduced their first non-space theme game; Gremlin/SEGA have come out with a fun-loving shooting game bound to enhance any arcade; Midway and Atari both offer parochial sports games for the U.S. market; and Taito themselves have launched two games of late, neither to do with space ships and not a laser beam in sight.

Video games are undoubtedly accepted now by the amusement catering trade—without many lingering fears of a repeat of the 1973 market collapse.

The equipment available today is more resolute and almost without precedent offered in a variety of cabinets. The explicit artwork from the original Space Invader to the colourful Alien provides appeal; and now we have talking video games to further amuse the player.

The introduction of table top versions of the popular video games was not initially accepted as a good move in the United Kingdom—but they have become an unqualified success.

Paul Hartley, Managing Director of Taito Electronics, claims that over fifty per cent of his total business is now table tops. Looking solely at the leasing operation to pubs, clubs and other leisure and recreation outlets he estimates seventy to eighty per cent of all Taito games installed are table tops.

Although it is hard to estimate the size and worth of the video games market, and Taito's share of that market, Taito do claim that their increase in sales of table tops has expanded the market significantly. Table tops are going into sites that previously found upright cabinets unacceptable, and as more video games go into these sites, so they are becoming accepted as an ancillary to drinking and leisure activities.

There are regional differences in the video market, with London and the South-East accepting more video games. Taito are therefore concentrating their marketing efforts at a regional level to tap the potential of the big provincial cities.

Taito also see a change in leisure habits, and see a trend towards family leisure, with pubs, clubs and sporting clubs, i.e. golf and squash, providing facilities for family and social groups.

Video games have an important role to play in the development of this leisure market.

But it is also in the non-leisure areas that Taito are looking for further expansion—any areas where people congregate and where video games could prove a welcome distraction, and a source of revenue.

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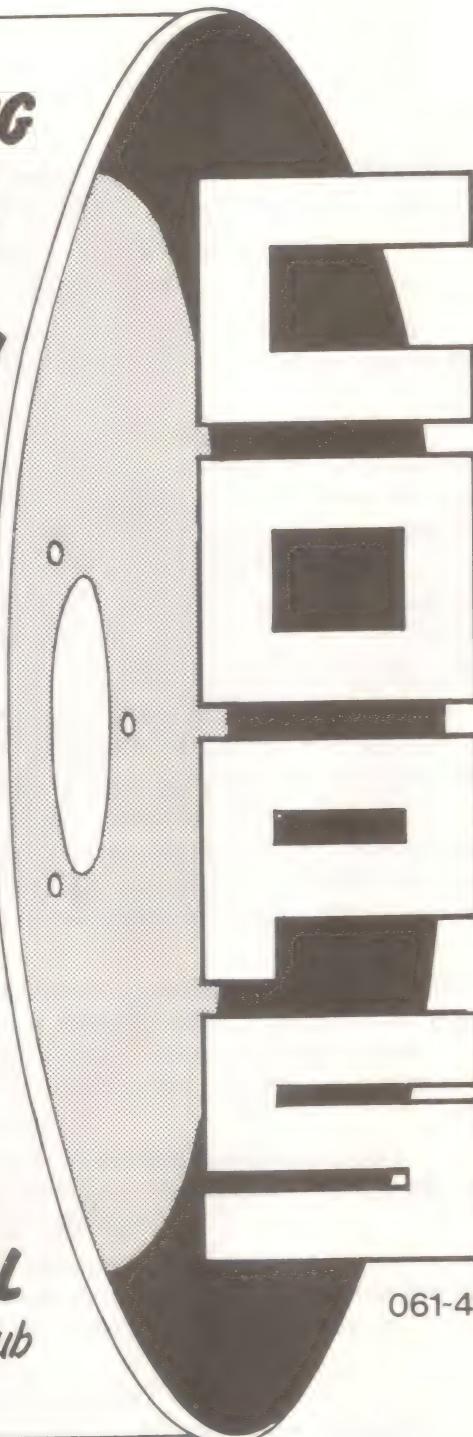
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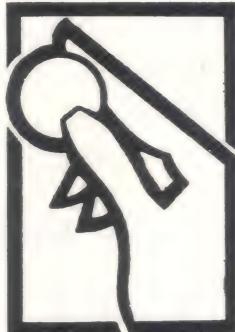
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How to put  
an end  
to all this . . .



If a customer hands a false coin to a shopkeeper . . . retribution is likely to be instantaneous! When he uses it in a change-machine, some time is likely to elapse before the dud is found. He has, in fact, changed bad money for good with little fear of detection.

Merchandise and cigarette vending machines are prime targets for dud coins. The object, of playing a gaming machine, is to take as much money from the machine by putting in as little as possible. Cheating "the coin mechanism" with false coins is taken to be a fair way to beat "the System". Coin operated machines are being cheated more than ever before!

There are features which the coin designer can incorporate in a coin which will reduce or eliminate fraudulent operation of coin-operated machines. Remember that many types of coin-operated vending and leisure machines do not justify sophisticated and expensive coin testers. However, it is not difficult to design an homogeneous coin for use in a simple tester incorporating features which deter the thief.

### Positive

But coins are being minted which are not compatible with testing procedures! . . . Coins which will not roll, coins which are too big or too small; coins which are too light to operate a microswitch, or cradle, coins having indistinct rims or any other feature too poorly defined for positive testing. Also these testers are being cheated by low value coins of the same currency being used as high value coins.

I have a list of thirty-three types of counterfeit 5 Deutsch Marks taken from the cash boxes of a German operator of leisure machines. Magnimat has not proven to be the panacea which was hoped. But to be fair I have more types of English 50p forgeries.

Coins are transported across frontiers to cheat machines. The Deutsch Mark tester is fooled by doctored coins from Britain, Czechoslovakia, Austria, Spain, Australia and half a dozen other countries.

So how should coins be designed for better security in coin machines? There are two basic features which can be utilised—material and shape.

A poor material for a high value coin would be

*'The coin designer can beat the cheat'*

—Says  
**DAVID BELLIS**  
Managing Director  
of internationally established  
Coin Controls Ltd.



one easily obtained by the general public—steel or brass for example—or a metal normally used for low value coins—such as bronze, aluminium or zinc. For a low value coin can easily be converted to a high value one if the diameter and alloys are not very different.

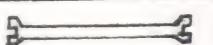
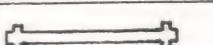
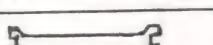
A good metal for a high value coin would be ferromagnetic. Paramagnetic fakes are so easy to forge from alloys with similar weights and resistivities to Cu/Ni25. A ferromagnetic coin can be tested by being swung around a magnet so that certain well-known tricks will not defeat the tester. As most testers cannot distinguish steel from nickel, a better material for high value coins would be semi-ferromagnetic. Typically 80% nickel and 20% copper ‘Coinal’—a mix which allows a coin to roll around a magnet then take a different path from the highly ferromagnetic or paramagnetic metals.

A poor shape for a high value coin would be

almost any non-round form which wouldn’t roll smoothly. One with an indistinct or low rim, or a coin which is thin with respect to its diameter and easily bent would also be undesirable.

A good shape for testing should have a very high and distinct rim at least 0.25 millimeters higher than the relief, a clear area should be left between the rim and the relief on both sides of the coin to assist the rim test. Features should be added to facilitate testing which should be identical on both sides and concentrically symmetrical. For example: A deep plain groove around the edge similar to a security edge but deeper. Or a reduced rim—i.e. take the rim of the coin and move it slightly away from the periphery leaving a ring round the edge of the coin—which allows us to test the coin as if it were two coins in one, a small fat coin and a large thin one.

To finish I would like to present the hypothetical case of my appointment as Mint Master of Utopia, creating a new coinage:

DIAMETER	VALUE	METAL	SHAPE	SECTION
27.5	100 cent	Coinal	Reduced Rim	
26	2 cent	Cu-Ni 15	High Rim	
24.5	10 cent	Nickel	Groove Edge	
23	50 cent	Coinal	Reduced Rim	
21.5	1 cent	Cu-Ni 15	High Rim	
20	5 cent	Nickel	Groove Edge	

*Although adjacent coins are only one and a half millimeters different in diameter, each coin made from the same metal or edge shape is four and a half millimeters different in diameter.*

*A totally cheat proof coin will probably never be made, but when a mint contemplates a new coin they must consult their coin machine industry at the design stage.  
BECAUSE THAT'S WHERE THE BAD BUCK STOPS!*

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# Are we ready for a cashless society?

**CASHLESS** payments appear to be accelerating as the now well established technology of the micro-chip transforms the reliability and economics of fund transfer and point of sale systems.

We have seen exhibited an experimental Bell-Fruit machine—the '2000'—utilising a magnetic credit card system, a vending machine and a juke box with a similar system.

The question is . . . will games and gaming machines go CASHLESS?

Let us quote some statistics from the world's most cashless society, the United States. The face value of all transactions is: 1% credit cards; 96% cheques and 3% cash. So in terms of face value the US is today 97% CASHLESS, only 3% of transactions are by cash. But if we look at the statistics another way, not by face value but by volume of all transactions we get a different story. 2% credit cards, 11% cheques, yet 87% of all transactions by volume are CASH. 87% of the total number of transactions are still by cash, most, of course, for small sums . . . 75% for less than \$1, 95% for less than \$10.

The method of payment is determined by its cost . . . each cash transaction has been calculated to cost 1.4 cents; each cheque transaction 29 cents; and each credit card transaction 55 cents.

In fact, transactions of less than one tenth of an average day's pay cannot bear the surcharge of being made cashless . . . cashless doesn't mean LESS cash!

So, until the enormous gap between the cost of a cash transaction and a non-cash transaction closes, the cashless factor can be largely discounted on any foreseeable time scale as far as coin/notes are concerned.

The most significant consideration to our industry is the gambler's need for the jingling-tinkling cascade of an occasional win!

Sources: Dr. L. C. Payne . . . Thomas De La Rue & Co. Ltd.;  
A. D. Little . . . *The Consequences of Electronic Fund Transfer*;  
and E. Hamilton & G. Budd . . . *The Economics of the Payments Mechanism*.

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# Gangland threat

A LARGE, rather scruffy man walks into a pub with a cocktail table, puts it down in a prominent position and tells the landlord: "I'll be back in a fortnight to empty it. Meanwhile, turn off your a.w.p. machine".

The landlord is also left under no illusion that to argue or fail to run off his a.w.p. machine will be a very unhealthy piece of rebellion.

UNFORTUNATELY, IT HAS HAPPENED.

In every industry there are black sheep and the coin machine business is no different. The 1968 Gaming Act was designed to drive out the criminal elements and effectively did so, but only from fruit machines.

Every operator of fruit machines has to be certificated and the rigours in obtaining a certificate are well known.

What has unfortunately happened is that there is now lucrative money in the coin machine business again—without the necessity for certification.

Our example has actually happened. There have been a number of instances of heavy methods being used to obtain sites. The methods have varied in terms of the degree of force, intimidation and threat employed, but the effect has been very largely the same.

When we say that there have been several instances of this kind of behaviour, we mean several. We are not attempting, as some elements in the Press would undoubtedly do, to suggest that it is rife. In the past few weeks there have been many stories suggesting intimidation, but we found only a handful of operators who have first-hand experience.

What we are attempting to do, through these pages, is illustrate the problem as it stands now, in the hope that it will be recognised and that the people with either the power or the influence to do something about it, will take action before it gets out of hand.

The latest video games produce attractive incomes. No-one is going to hide the fact and nothing is being given away by saying so. This, by itself, attracts elements who would under normal circumstances have no chance of obtaining a certificate to operate.

There are suggestions within the trade that the people being attracted to the industry are not merely new people, but people who went out of business as a direct result of the 1968 Gaming Act.

Public houses form the main target for the malpractices, obviously, and in many cases the undesirables are thwarted by the involvement of the breweries, who dictate to tenants who will operate video games on their sites.

But there are still places where the breweries do not have strong control, or even no control over machines other than fruit machines. These are the sites that are wide open to abuse, together with a large sector of the market which is also not subject to brewery guidance and control, such as free houses, clubs, cafes, shops, etc.

In the case of "uncontrolled" tenanted houses, it has often been the result of pressure from the National Union of Licensed Victuallers to obtain better returns for tenants from fruit machines. In those cases the wrangling may have led to a concession by breweries over other forms of coin equipment. Whatever the reason, there is a notable number of sites of all descriptions where the landlord may openly choose which operator to use, faced with pressure from burly gentlemen of dubious background, therefore, few landlords will be able to resist.

As a publication, we are not attempting to offer the trade advice on how the problem should be tackled. If, indeed, it becomes a real problem. We are pointing out that it does exist now and that there are dangers that it may escalate.

What we are saying is that there are options open to whoever may care to implement some method of rectifying the situation.

1—*The breweries could insist on certificated suppliers for all types of coin machines in their pubs.*

2—*The breweries could insist on the use of one operator from an approved list.*

3—*The law could be changed to demand that the operators of all types of coin machines should be certificated by the Gaming Board.*

In the first example and the second, only part of the problem would be solved, for there are a large number of sites not under the control of breweries. The first example would also tend to

# are operating

exclude the small, but notable, number of uncertificated but perfectly respectable companies already in the field.

The second alternative would permit the use of those companies who are uncertificated but respectable, although it would throw a considerable weight on to the brewers to investigate the background of operators applying for sites.

The third alternative was actually recommended by the Royal Commission on Gambling who said that all forms of coin-operated equipment should come under the jurisdiction of the Gaming Board. When the Report was issued, the British Amusement Catering Trades Association—BACTA—felt strongly that if implemented then in fairness there should no longer be a ban on profit-sharing on fruit machines.

Again, it should be noted that there are quite respectable companies in the industry who, for various quite honourable reasons may be unable to obtain a certificate. In fairness to them, perhaps a system could be implemented which laid down that providing a company had been trading quite properly for a set period of time, then they should obtain a certificate as of right.

Another alternative would be a two-tier certificate system, using gambling certificates and non-gambling certificates although it might reasonably be argued that this would be very unwieldy. Another problem with any form of certification is the seaside arcade owners, who currently needs no certificate to operate. Many of them use their arcade machines on single-sites during the winter months to enable them to more readily reinvest for the following summer. A method of safeguarding their interests would also have to be found.

The problem is a complex one, without a simple solution, but if the malpractices are to be nipped in the bud then some action may soon be required.

We know that BACTA is already well aware of the situation, that discussions on the subject have already taken place at all levels and that the talks are continuing.

It is to be hoped that the Association will take the view that it is far better for the trade itself to recognise the problem at an early stage—and be seen to recognise the problem—so that if any kind of scandal does break then at least the responsible majority of the industry will have been in the forefront of moves to prevent it continuing.





**F**RED GRANGER is a conscientious character, stolid in his organisation of the major event in the American calendar—the AMOA annual exposition and trade show scheduled again for the Conrad Hilton Hotel in Chicago from October 31 to November 2.

The U.S. event has for years been looked on as the trade's premier show. Not only because of its timing, but because it is also staged in the hub of the industry's manufacturing network firmly established in Illinois. That the Japanese have recently provided a serious threat, interesting worldwide since the advent of video as a coin machine bonanza; or the fact that many industry personnel throughout the world have for a great number of years regarded the London based ATE as THE event, Fred Granger modestly surfaces unruffled, unperturbed.

"I really do not know where AMOA's show ranks in the international scene", he recently told David Snook. "You are a better judge of that".

Sold out of exhibit space for this year's event since early June, Fred Granger said: "We are not concerned with being the biggest show. What is important is to have a good quality show". Of that there can be little doubt.

### Adverse legislation

The Association is now 32 years old, being formed as the Music Operators of America on January 21, 1948. Although it was founded primarily to combat adverse legislation, it soon began to develop into a fully fledged trade association providing an ever-increasing service to its snowballing membership.

Better relations were established between manufacturers, suppliers and operators and a growing awareness of the need for public relations prompted steps to improve understanding with the Press.

A pattern of annual meetings and conventions was established and eventually group insurance programmes were made available to the membership through the young association.

The fifteen years from 1948 to 1963 were years of growth for MOA and of progress for the US industry which had never before known what it was to have a national organisation, something the majority of other industries took for granted.



There were problems during those years: the copyright royalty problem was always there, year after year as it is today. And there were others.

It is often difficult to get sufficient backing for an association and this was no less true of MOA. Association leaders in those early days often reached into their own pockets to support association activities which were really of benefit to the whole industry. This was necessary because neither the dues structure nor the number of dues-paying members could sustain work that had to be done such as sending witnesses to Washington to oppose adverse copyright legislation.

The first convention sponsored by MOA was held in 1950. Prior to that time, in the 1940s, operators had attended the Coin Machine Industry conventions. The first MOA convention was a three-day event held in the Palmer House in Chicago. Attendance was light, according to the records less than 500, but an important association service, the annual convention was firmly established.

The 1951 convention again held in the Palmer House, was historic because it was during this second convention that MOA passed from a national committee to a national association.

With one exception every annual MOA convention from 1956 to 1963 was held in the Morrison Hotel in Chicago. The one exception was 1961 when the convention was moved to Miami Beach, Florida. The old Morrison was demolished in 1965 and a bank building now stands on the site.

In January of 1964 the executive committee appointed Frederick M. Granger, a professional association executive, as MOA's third Managing Director and co-ordinator—the board subsequently changing the title to that of executive



# status as solid as ever

Vice-President. In 1969 the board overhauled the election system of the association to make it more democratic and in the process dropped the office of Chairman of the Board; Howard N. Ellis being elected President.

In 1969 and 1970 the first edition of the highly acclaimed *Jukebox Story* was published and by 1971 MOA had built up a tremendous momentum. It was still alert as always to the copyright royalty problem, but it was also producing more and more services for the membership.

The President in 1971, Les Montooth, said that "probably none of us thought in the beginning MOA would go so far". In 1972 with John R. Trucano as President the association launched a programme of regional seminars to be conducted by the University of Notre Dame. The Exposition was moved to the Conrad Hilton Hotel in Chicago, and was probably one of the most spectacular trade shows in the association's history up to that time.

In 1973 MOA celebrated its Silver Anniversary and called it "Our Proud 25th!" It was a year in which the association had begun to consolidate many of the gains brought about over the years by many dedicated people. Among other things the annual trade show had begun to increase in size and prestige and, as President Harlan Wingrave said: "It had become a recognised international event in the world of coin-operated music and games".

The year before 1972, one large room, the East Room with 29,413 sq. ft., was big enough for the entire show. A year later in 1973 it was necessary to add the North Room with 5,000 sq. ft. to accommodate additional exhibitors.

During 1974 the association launched a

membership drive and fought copyright legislation under the Presidency of Russell Mawdsley. Approximately 100 new members were recruited and the total rose to 1,000 members for the first time.

The Copyright Revision Bill came to a vote on September 9, 1974, and with the guidance of Nicholas E. Allen, MOA's Washington legal counsel, plus the assistance of many members, three amendments introduced on MOA's behalf were all passed—an important victory for every juke box operator in the US.

For a third year in a row the trade show was bursting its seams and it was necessary to replace the smaller North Room with the West Room—29,368 sq. ft.

## Milestone

1976 was a milestone in the association history. After 28 years the board of directors agreed that the name of the association — Music Operators of America—was no longer representative of all the association stood for. Several names were proposed and membership approved the name of the Amusement and Music Operators Association, AMOA, which recognised the tremendous development in games as well as music. The man who presided over that important change was Ted Nichols, a veteran of 18 years on the board of directors. During the same year Congress passed the Copyright Revision Bill affecting juke boxes—\$8 per box per year—and the trade show continued to grow.

AMOA's status is solid and there seems little doubt that with Fred Granger's astute guidance it will continue effectively to serve the membership in particular and the industry in general to the advantage of one and all.

# SEEBURG: a name worth salvaging

THERE is a welcome air of relief abound the juke box industry at present, brought about by the progressively minded Stern Electronics organisation and their latest acquisition—the world reknown Seeburg.

Bankruptcy orders were served on the Seeburg set-up last October and only after lengthy court proceedings did Stern Electronics salvage one of the juke box industry's outstanding names. This in itself is important, Seeburg having swiftly moved with the times and introduced the world's first juke box to accomodate today's 45 r.p.m. records.

RCA brought out the seven inch record in 1949 and Seeburg instantly backed their innovation, realising the juke box operator would readily accept the smaller, lighter and faster disc naturally assuming the quicker it played, the shorter the playing time for each record.

Seeburg offered exchange to convert their 78 r.p.m. Select-O-Matic boxes to the new trend. In 1950 Seeburg launched the first exclusive 45 r.p.m. juke box—the M100B—three years ahead of any rival.

Capturing a considerable part of a new market Seeburg contributed to a massive boom in population record sales in the United States—a fact the record industry there has never failed to appreciate. To this day the record industry still uses the juke box in market research and promotion in the States.

The Seeburg name originated in Sweden in 1871 with the birth of one Justus P. Sjoberg. In 1886 Justus left Sweden for Chicago and started to progress through the piano industry and in 1907 the J.P. Seeburg Piano Co. was formed.

Twenty years later, however, Seeburg looked away from the keyboards and set their sites on an electric multi-selection coin-operated record playing phonograph . . . their development, admittedly with caution, throughout the '30s and their awareness to the innovation of the seven inch disc has since provided the juke box operator constantly with a durable, acceptable product.

Stern Electronics are injecting up to \$4 million to restart production of Seeburg's modern juke box, the Phoenix, and it is hoped production figures in excess of thirty phonographs a day will be evident by the end of the year.

The juke box industry awaits Stern's further innovation to an innovation itself.



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**R**IIGHT on the borders of New South Wales and Queensland are two towns, Tweed Heads, on the NSW side, and Coolangatta, on the Queensland side.

*Every day hundreds of Queenslanders cross the street, literally from one state to another, and play some of the 335 poker machines in the Twin Towns Services Club.*

*A survey of the 13,066 members on the club's roll showed that 60 per cent were Queenslanders, coming over the border to enjoy the facilities that poker machines—illegal in their own state—can provide.*

*The club made a profit of A\$2.2 million in 1979 after a turnover of A\$13.4 million with the machines providing almost exactly half of that figure. The fabulous returns from the machines has provided members with a plush club which is now undertaking three major projects as a result, a massive new car park, a new Memorial Hall and a sports complex nearby which will include an 18-hole golf course, clubhouse, gymnasium and other facilities.*

## MONOPOLY

*And the club does now have the monopoly on the town's potential for the nearby Tweed Heads Bowling Club has already given hundreds of thousands of dollars to a local hospital.*

*Much of it undeniably originates in Queensland and for a number of years pressure has been mounting within the state to follow the example of its neighbour and introduce legalised poker machines.*

*The state is not huge in terms of population. Only the capital, Brisbane, has a population density—around one million—that suggests adequate support for major clubs, yet the psychological effect on other Australian states of legalising poker machines in Queensland could prove contagious.*

*A recent Gallup Poll held throughout Australia asked the question: "Would you permit poker machines in clubs?" The national total was 59 per cent in favour and the break-up by states showed that only the people of Tasmania would be opposed to it. In Queensland it was 62 per cent in favour and 31 per cent against.*

*A poll of clubs in Queensland asking them if*



*they favoured the introduction of poker machines resulted in 82 in favour, representing 78,036 members, with just one against and three abstaining.*

*Faced with this kind of statistic, the Queensland Government has found itself coming under more and more pressure from the Australian Club Development Association, an organisation to which the Queensland, Victoria and South Australian Club Association are affiliated and which is dedicated to legalising poker machines in states outside NSW.*

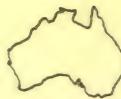
*The ACDA is headed by Ted Vibert, a figure not unknown in the UK, who vigorously pursues the Association's prime aim.*

*His main target currently is the political scene with a General Election due in Queensland in October. He hopes it will be made an election issue and already the opposition Labour Party, cocking an appraising eye at the statistics, have pronounced themselves behind the theory. Vibert and his colleagues hope that the Liberal-Country Party coalition currently in power and named the National Party, will also come out in favour of it, although it is less likely.*

*Vibert commented: "It has been my firm conviction for a number of years that poker machines will eventually be legalised in Queensland clubs. This conviction is based on the following:*

*"1—The poker machine financed clubs of New South Wales represent the world's most successful leisure co-operatives.*

*"2—The financial impact of the club industry is so enormous that any student of basic*



# Queensland poised for pokies

*economics can appreciate how a club industry with poker machines can give any state a huge and powerful boost to a depressed economy, particularly in the realm of employment.*

*"3—The staggering success of the Tweed Heads clubs, so close to Queensland's capital city, will eventually permeate the closed minds of the Queensland politicians and they will get the message".*

## FORECAST

*What would be the effect of the "opening up" of Queensland? The ACDA research team headed by Mr. Murray Yabsley came up with a four-year forecast if machines were legalised in 1981.*

*Their research indicated that there would be 1,100 clubs by 1985 compared with 623 now. Thirty thousand people would find direct employment from the clubs compared with 6,000 at present, with an annual wage bill of A\$416,000,000. A total of 175 million dollars would be spent on new buildings and another 35*

*million on air conditioning, refrigeration, carpeting, bar reticulation and plumbing and the State Government would receive 199 million in poker machine tax and licence fees.*

*Even more important, perhaps, is the effect on the rest of Australia of Queensland opening up to machines. In fact, New South Wales is not the only Australian area with legalised machines. It is not generally appreciated outside the country that its own Canberra Capital Territory legalised them in November, 1976. The Territory only has 250,000 people and 70 clubs and therefore currently around 1,000 machines, all on ten-cent play, but the move did open up another chink in the armour of the opposition.*

*To be realistic the opposition should not be underestimated, even in Queensland and the supporters of machines will have a long, hard fight for state acceptance. After that there will be an even longer, harder fight, for machines to be acceptable in other population intensive states of Australia.*

*But the writing does seem to be on the wall. It is only a matter of time.*



*The impressive Twin Towns Services Club*

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ONE of the most unusual markets for coin-operated gaming equipment is New South Wales—the only Australian state apart from the Capital Territory which has legalised the machines as a form of raising revenue and also as a social benefit.

This latter aspect is investigated in these pages by DAVID SNOOK and displays graphically just how gaming machines can be used as a benefit to society.

*The impressive Aristocrat 'Entertainer' machine and below a typical scene in one of many New South Wales social clubs.*





EATING oysters in the opulent dining room of a working men's club in the rougher area of Birmingham is about as far removed from reality as a snowball surviving in hell—and it doesn't happen. But the reason for drawing the analogy is that its equivalent did happen . . . on the other side of the world.

It happened at the South Sydney Junior Leagues Club in the suburbs of the Australian city in July. Oysters are a regular part of the menu and the opulent dining room is only one of two at the club, not counting a snack bar. The comparison with a working men's club is appropriate as the South Sydney Club—or Souths as it is simply known—caters for what could be loosely described as the working classes of Sydney.

The place oozes cash. A huge club, it has 55,000 members who pay a modest five dollars (£2.50) per year in membership fees and for that they have the facilities of the restaurants and snack bar, fully-equipped men's and women's gymnasiums, saunas, swimming pool, top class entertainment with a different show every week, the use of a 40-foot cabin cruiser named *Southern Belle*, subsidised holidays at a club-owned village called Una Voce on the beautiful Hawkesbury River, subsidised food and drink from ten bars and the use of a richly carpeted and decorated club seven days a week.

For five dollars a year! How do they do it? Poker machines.

### *Glistening*

The club has 495 of them, glistening in shiny rows throughout the premises' 200,000 square feet; all actively engaged in taking the members money off them and then giving it back in the form of facilities.

Souths is the largest club in Australia, in terms of the number of machines on its premises. In the 1978 fiscal year the club made a net profit of A\$644,000 out of a turnover of A\$4,356,000 of which just under half came from its poker machines. The club has net assets of A\$7,800,000.

The statistics are perfectly mind-boggling but they all add up to the same thing: that without the poker machines, or "pokies" as they are affectionately referred to by their players, the clubs of New South Wales could not survive or at best could not survive in their present form.

The vast subsidies provided by the proceeds of machines form the foundation of the viability of

# All for a mere five dollars!

the state's 1,535 licenced clubs as well as a cool \$110 million to the State Treasury in the form of licence fees for each machine.

The market has 48,000 machines, supplied by basically three companies, Aristocrat, Nutt and Muddle and Bally, who are ranged in that order in terms of market share. The market itself is essentially different from the UK fruit machine market in that it is strictly a three-tier rather than four-tier business.

The missing link is the operator. The manufacturer makes his machine and sells it to the club, sometimes via a distributor or agent. Operating poker machines in Australia is strictly illegal. In fact most of the market is two-tier as the manufacturers sell most of their machines direct to the sites.

They are called poker machines because card symbols on the reels are simply more popular than fruit symbols. Otherwise they remain much the same as their British club counterparts, fast, with sometimes only a three-second play cycle, simple and for the most part, bench models. Features are kept to a minimum to prevent the play cycle becoming prolonged, and multi-coin entry to play successively more valuable award cards is permitted but generally is kept to only three coins for the three lines in the window.

Twenty cents—about ten pence—is currently the highest denomination permissible in New South Wales. There are still a few five-cent machines around but the ten-cent play remains the top category. This situation is unlikely to remain so

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for long, however, as the industry is gradually moving closer to the higher play value. Souths, for example, has a ratio of 60-40 in favour of ten-cent machines but the point of parity is not far off.

The poker machine is estimated to be worth A\$400 millions a year to the NSW clubs, a massive injection of viability without which the whole social scene in the state would alter demonstrably. Its operation is restricted to non-commercial clubs, that is, clubs where the profits go back to the members in the form of improved facilities.

South Sydney Junior Leagues Club is actually a sporting organisation, supporting 170 junior rugby league football teams involving 3,000 young players. The club pays their transport costs, provides jerseys, socks and shorts and invests in their coaching. Souths is unusual in that it does not actually run its own series of rugby league teams, unlike many other clubs, such as the famous St. George's.

### *Upper class*

Not all of the clubs, of course, are large ones. With my guide, Aristocrat's Bob Cousins, we went to the Royal Motor Yacht Club of Sydney, an exclusive establishment overlooking the moorings in one of the bays running off Sydney Harbour. This was real, upper class stuff with glass-housed trophies and pennants festooning its grand surroundings.

The RMYC and its members gave the distinct impression that they don't really approve of pokies, judging from the rather self-conscious way the members played the four ten-cent and thirteen 20-cent machines around the lounge wall. The figures for the club in 1978 showed a turnover of A\$328,000 with the machines providing a hefty A\$185,000 of that. Nevertheless the members' reluctance to play the machines, or rather perhaps, their reluctance to be seen playing the machines, means that the club is comparatively poor compared with the Souths club.

So how is the industry in New South Wales actually regulated?

The manufacturer designs a new machine and advises the State Treasury of the machine's combination, payout structure and any features, together with its own figures. The Treasury investigates, examines the machine, tests the combination theory and if satisfied, issues an approval. The machine can then be sold to a club.

It must, by regulation, have a minimum payout of 80 per cent of the input, although trial and error long ago demonstrated that anything less than 85 per cent is quickly ignored by the players.

The club has to purchase the machine, or sign up for the method of payment within 30 days of its installation.

For each machine, the club pays a licence fee to the Treasury each year, on a sliding scale appropriate to each denomination of coin used in the machine. The industry, for example, feels rather upset that the licence fee structure apparently penalises the clubs for having 20-cent machines by swinging A\$2,500 fees, despite the fact that in these inflationary times 20-cent machines are essential to maintain income.

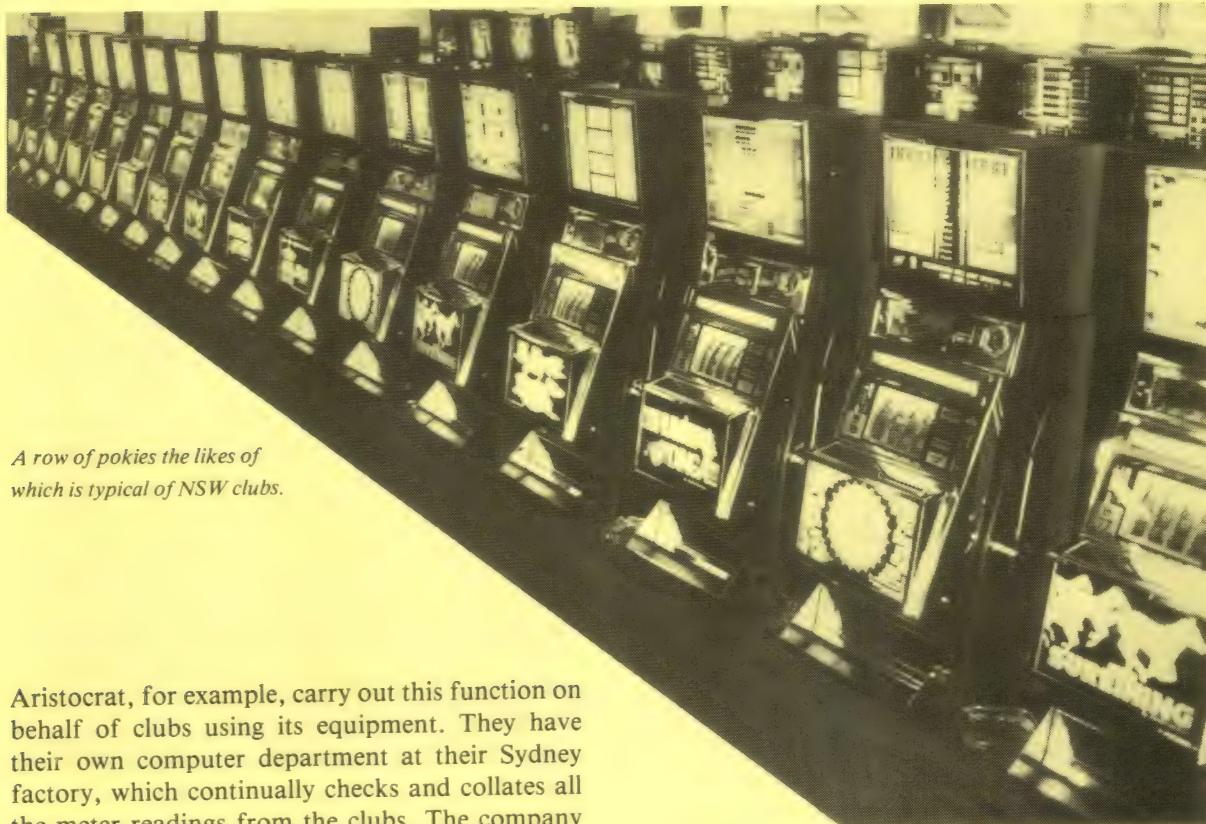
On top of the fees, if the club makes a good profit it may become susceptible to a turnover tax. In addition to that there is an automatic 27½ per cent sales tax on the initial price of the machine, which all-in-all demonstrates just how well the State Government does from its machines.

Security is always the biggest problem in regulating any form of legalised gambling by means of machines. In New South Wales they seem to have cracked the problem in the most simple way—make the collation and presentation of machine returns too complex for the average club official!

The machines are all fully metered, of course, and the law demands that a wide-ranging scale of facts and figures should be presented to the Treasury on a regular basis so that the Treasury, in turn, can follow the progress of its investment and ensure the player is getting a fair crack of the whip.

It is also patently obvious that the figures will come in extremely handy some time in the future should the Government decide to change the method or level of tax payment from the machines.

The collation and production of the statistics required by the law means that should any "fiddling" be taking place on-site, then it would take a virtual mathematical wizard to disguise the fact over a long period of time. As it is the vast majority of club managements do not even attempt the complex job and leave it to their own professional accountants or to a minor new industry that has sprung up, independent returns assessors, sometimes even the manufacturers themselves.



*A row of pokies the likes of which is typical of NSW clubs.*

Aristocrat, for example, carry out this function on behalf of clubs using its equipment. They have their own computer department at their Sydney factory, which continually checks and collates all the meter readings from the clubs. The company charges a small fee for the service but obviously is delighted to perform the function in any case as it gives them invaluable information on the performance of their own equipment as well as that of competitors.

### *Cheating*

A typical balance sheet from a club, churned out by the computer, gave the total number of plays, turnover, gross takes, refills, jackpots paid manually, net operating profit, jackpot as it performs against its calculated percentage, operating percentage variance—where mechanical or cheat faults are most easily pinpointed—net profit variance and a host of other information. It is easy to see, therefore, why cheating is totally beyond the comprehension and ability of the vast majority of club officials.

To take away the risk of a skilled minority, therefore, the law has a safety factor built into it which proscribes regular on-site spot checks by Treasury officials.

The system is therefore security tight. The Government is provided with a lucrative income, the clubs with a fabulous source of revenue, the public with glorious entertainment and leisure

facilities and the manufacturers employ a great many people—Ainsworth alone has a payroll of 1,000.

The non-commercial tenor of the New South Wales poker machines adds further respectability to the trade, in the sense that while the player may pour unwise amounts into the machines it is indirectly coming back to him by virtue of the other amenities he may enjoy at his club.

Above all, the club gambling machine system in New South Wales confirms the long-held view of the machine's supporters; that if properly controlled, as it is in New South Wales, the United Kingdom and Germany, notably, then the fruit machine, slot machine, poker machine or whatever you may call it, can not only be an innocent plaything but a positive benefit to the community as a whole.

After all, it is a basic characteristic of mankind to gamble. Given a universal acceptance of the fact that governments should harness, rather than attempt to quell, human instincts, the operation of coin machine gambling as projected in the countries where a responsible attitude is taken, could well spread to others.

## *An affectionate look at the place we loved to hate . . .*

**I**N late August, would-be exhibitors at the Amusement Trades Exhibition received details of the alternative facilities available at Olympia. Without exception they will have winced at the prices they will have to pay for their stands and no doubt most of them will have, at least momentarily, spared a thought for poor old Alexandra Palace, now in ashes.

To be fair, inflation would probably have meant at least a 20 per cent increase in the cost of 'Ally Pally' stands had the place not burned down on July 10.

Even so, there are many in the trade who will miss Alexandra Palace, variously referred to as "the Victorian public convenience" or "a draughty eyesore" that perched on a hill overlooking North London. Certainly, it was cold, tatty, contained inadequate space for the trade's needs, parking and access was awkward, delivery and collection of machines difficult, security a headache and the catering left something to be desired.

### Vision

Yet for all that, 'Ally Pally' had an air of magic about it and many companies will bless its memory for it was there that they found their feet. The blaze on that disastrous Thursday provided the old building with its last sensational fling in a very chequered history.

The idea for the building was conceived in the wake of the success of the Great Exhibition of 1851 by Owen Jones, one of the men involved with the Crystal Palace event.

His vision of a "palace of the people" in North London did not receive the support he hoped for and his company, set up to promote it, was dissolved in 1860. Another firm was founded to bring the idea to fruition, Alexandra Park Co. Ltd. in 1863. The company negotiated the purchase of sections of the 1862 International

Exhibition in Kensington for re-erection on Muswell Hill.

Unfortunately, this company too went into liquidation in 1865, leaving behind it an unfinished structure.

Various people tried to complete the project and one by one they failed for one reason or another until finally, in 1866, the building was completed. Even then another seven years had to pass before the official opening could be staged because there was no money left in the kitty to equip the monstrous building.

It finally opened to the public on May 24, 1873, which was Queen Victoria's birthday. It towered above Muswell Hill with a huge central dome and two smaller cupolas over the side transepts. The imposing looking building had large rose windows decorating its frontispieces, arched doorways and patterned brickwork in a fashionable Italian style. Only 16 days after the opening, however, after 124,000 people had visited the new gem in London's crown, it burned down! A great fire started in the central dome and reduced the place to ashes.

Another programme began to put it up again and the re-designed palace was opened in 1875, on May 1, just short of two years since its initial opening. This time the building was to survive over 105 years before fire took it again.

The new building had a number of new features, including four corner towers each supporting tanks holding 6,000 gallons of water—a precaution against more fires. The rebuilding programme cost £400,000 but the owners, London Financial Association, struggled to recoup their investment. Alexandra Palace became a financial white elephant and the building had to be completely closed from 1889 for nine years. One lessee who hoped to bring it back to life went bankrupt inside 12 months in 1898.

The grounds, which covered 220 acres, contained



a racecourse, cricket ground, ornamental lakes, tennis courts and a swimming pool. All of these had been sold off and local residents began to worry that the entire park would be hived off by the owners. They took their concern to higher authority and as a result the Alexandra Park and Palace, Public Purposes Act was passed in 1900. This gave the park and palace under the control of trustees consisting of representatives of Middlesex County Council and several local authorities. The building reopened under new management in May 1901 and again, the trustees had to struggle to make it pay.

### Bomb damage

From 1914 to 1918, during the war, the building was used as a mobile centre for the forces, a camp for Belgian refugees and as an internment camp for prisoners of war. During the Second World War a bomb damaged the apse as well as the huge Willis organ which was driven by two steam engines, as well as the vast bellows which were still to be found in the building right up to the recent fire.

When the Middlesex County Council went in

reorganisation of local government, the palace came under the jurisdiction of the Greater London Council from May 1, 1966. A feasibility study was undertaken by the council with a view to transforming the palace into a recreational centre. Lack of funds killed the idea, however, and there were even suggestions that it should be pulled down.

The public felt a deep affection for the old building, however, and it was retained for exhibitions, concerts, band performances and other entertainments. Until the great fire, it was used for exhibitions for four months of the year and the rest of the time used for a collection of auctions, jumble sales, rallies and concerts.

All of the time, however, 'Ally Pally' was falling into worse and worse disrepair through lack of maintenance, constantly changing management and long periods of inactivity. After lengthy discussions it was decided to embark on a programme of reconstruction work proposed by Haringey Council who took over the building from the GLC in January last year. The project was to have cost £8.5 million.

Then came the fire . . .

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